

Getting Started

- Start at the Human Resources home paa33263.72hS3.7 1



Adding Progress Notes for Employee

Individual Reviews Progress Notes

- Select My Employees' Reviews on the left hand side of the page.
- Select the Individual Employee review. Click Progress Notes on the sidebar, then click Create Progress Note

The Dashboard Progress Notes:

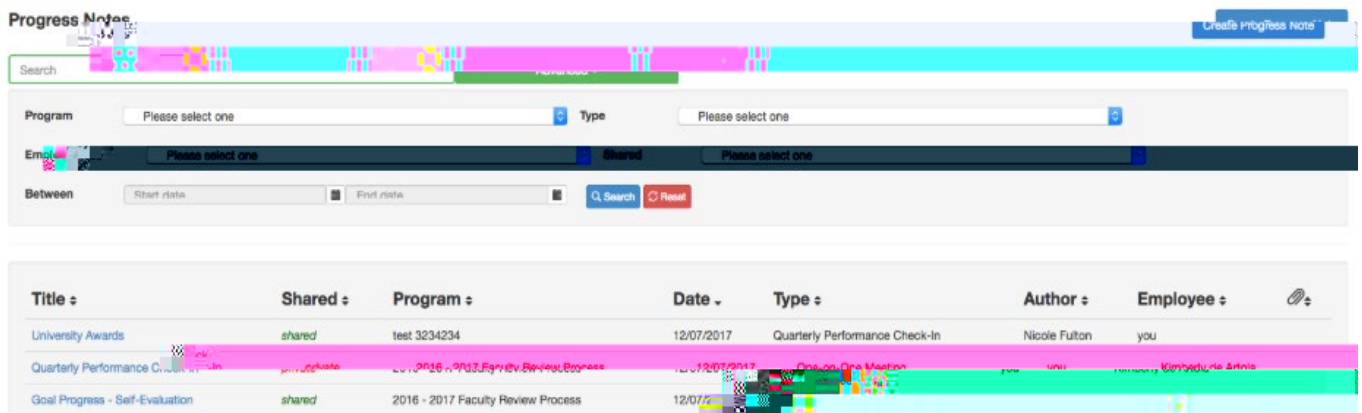
- Select Progress Notes on the toolbar. Click Create Progress Note.

The following popup will appear:

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Viewing and Editing Progress Notes

- Select Progress Notes on the toolbar to see a dashboard with all notes. Click Advanced to filter your notes by Program, Employee, Type, or Date. You can sort your search by any column.
- To view a progress note, click the title. The progress note will appear as a popup, and you will be able to Delete or Edit.



The screenshot shows the 'Progress Notes' dashboard. At the top right is a 'Create Progress Note' button. Below is a search bar and filter options for Program, Employee, and Type, each with a 'Please select one' dropdown. There are also 'Start date' and 'End date' fields and 'Search' and 'Reset' buttons. Below the filters is a table of progress notes.

| Title | Shared | Program | Date | Type | Author | Employee |
|---------------------------------|---------|------------------------------------|------------|--------------------------------|---------------|-----------------|
| University Awards | shared | test 3234234 | 12/07/2017 | Quarterly Performance Check-In | Nicole Fulton | you |
| Quarterly Performance Check-In | private | 2016 - 2017 Faculty Review Process | 12/07/2017 | One-on-One Meeting | you | Kimberly Artale |
| Goal Progress - Self-Evaluation | shared | 2016 - 2017 Faculty Review Process | 12/07/2017 | One-on-One Meeting | you | Kimberly Artale |